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E.O. 11652: NA
TAGS: BEXP AFSP NL
SUBJECT: FY-78 COUNTRY COMMERCIAL PROGRAM - NETHERLANDS

REF: (A) 76 STATE 309137, (B) 76 STATE A-5960, (C) 76 STATE
292385, (D) 76 STATE A-5757, (E) 76 THE HAGUE A-124, (F)
76 STATE A-3359, (G) 76 THE HAGUE 2079

1. INTRODUCTION AND SUMMARY. A. REF B REQUESTED, THIS
CABLE COVERS SECTIONS II, III AND IV OF THE FY-78 CCP, THE
OTHER SECTIONS BEING THE SUBJECT OF SUBSEQUENT COMMUNICATIONS.

B. IN RESPONSE TO WASHINGTON'S SUGGESTIONS TO LIMIT NUMBER OF
CAMPAIGN (REF A), WE HAVE RETAINED AS MAJOR CAMPAGINS ONLY
SEVEN, COMBINING COMPUTERS AND BUSINESS EQUIPMENT INTO ONE,
AND UPGRADING CHEMICAL AND PETROCHEMICAL PROCESSING EQUIPMENT
FROM INITIATIVE ACTIVITY TO CAMPAIGN, OUT OF THE TWELVE
PROPOSED IN REF G. WE HAVE ELIMINATED TWO CAMPAIGNS: COMM-
UNICATIONS AND PRINTING AND GRAPHIC ARTS EQUIPMENT, THE LATTER
BECAUSE THE PROSPECTS FOR INCREMENTAL US EXPORTS IN FY-78
ARE NOT FAVORABLE, AND ALTERED THE STATUS OF THREE CAMPAIGNS:
BUILDING AND CONSTRUCTION EQUIPMENT AND SUPPLIES; ENERGY
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SYSTEMS; AND FOOD PACKAGING AND PROCESSING EQUIPMENT, TO
OTHER SPECIAL POST EFFORTS. OF THE ELEVEN INITIATIVE ACTIVITIES
PROPOSED IN REF G, WE HAVE UPGRADED ONE TO CAMPAGIN STATUS AS
INDICATED ABOVE, NINE WERE RETAINED, AND ONE, CHEMICALS,
WAS ELIMINATED. WE HAVE ADDED FIVE NEW ACTIVITIES EITHER TO
RESPOND TO WASHINGTON'S SUGGESTIONS, SUCH AS THE FOREIGN
TRADER INDEX, OR BECAUSE THE SECTORS ARE INCLUDED IN TARGET

INDUSTRIES. THUS WE ARE PROPOSING FOR FY-78 SEVEN CAMPAIGNS AND FOURTEEN OTHER SPECIAL POST EFFORTS.

C. REF A SUGGESTED THAT CHEMICAL AND PETROCHEMICAL PROCESSING EQUIPMENT BE MADE A PRIORITY CAMPAIGN, AND THAT POLLUTION CONTROL EQUIPMENT, AND PROCESS CONTROL INSTRUMENTATION BE INCORPORATED INTO THAT CAMPAIGN. WHILE THESE THREE SECTORS ARE RELATED, WE BELIEVE THAT OUR PROMOTION EFFORTS WOULD BE MORE EFFECTIVE BY HANDLING THE THREE AS SEPARATE CAMPAGINS, AS THIS CABLE PROPOSES. THIS WILL NOT CAUSE ANY DIFFICULTY FOR THE COORDINATED ARRANGEMENT S OF A TYPE I US PAVILION AT PETROTECH.

D. THE PROPOSED CCP INCLUDES EIGHT OF THE FIFTEEN PRINCIPAL TARGET INDUSTRIES AND THREE OF THE ELEVEN SECONDARD TARGET INDUSTRIES, LISTED IN REF F. THE OTHER INDUSTRIES WERE NOT INCLUDED BECAUSE PROSPECTS FOR INCREMENTAL SALES ARE NOT FAVORABLE, AND ALSO IN RESPONSE TO WASHINGTON'S SUGGESTIONS TO LIMIT THE NUMBER OF CCP CAMPAIGNS.

E. BESISES ONE TYPE I EXHIBITION, TWO CATALOG SHOWS, ONE TRADE MISSION, AND ONE IN STORE PROMOTION, ALREADY APPROVED BY WASHINGTON, WE RECOMMEND THREE ADDITIONAL USDOC CATALOG SHOWS BECAUSE WE CONSIDER THEM AS EXCELLENT VEHICLES FOR TRADE PROMOTION FOR THREE OF THE PRINCIPAL TARGET INDUSTRIES.

F. THE PROPOSED CCP CAMPAIGNS AND OTHER SPECIAL POST EFFORTS CALL FOR THE PREPARATION OF 332 TRADE OPPORTUNITIES (TO'S), THE PROMOTION OF BUSINESS MEN'S ATTENDANCE AT EIGHTEEN PLANNED EVENTS IN THE LONDON, PARIS AND STOCKHOLM USTC'S AND OFF SITE UNCLASSIFIED

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EXHIBITIONS ORGANIZED BY THE NEWLY ESTABLISHED COLOGNE INTERNATIONALMARKETING CENTER, AND EIGHT FOREIGN BUYER PROGRAM (FBP) EXHIBITIONS IN THE US, AS WELL AS FIVE NOT INCLUDED IN THAT PROGRAM.

G. OUR RECOMMENDATIONS FOR THE FY-78 CCP ARE BASED ON THE SAME LEVEL OF CURRENT STATE FUNDED PERSONNEL AS OUTLINED IN SECTION II (TEN AMERICANS AND SEVENTEEN FSL'S). SHOULD OUR PERSONNEL RESOURCES CHANGE AT IMPLEMENTATION TIME OF THE FY-78 CCP, OF COURSE WE WILL HAVE TO ADAPT OUR PROGRAM TO SUCH CHANGE.

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H. WE HAVE NOT INCLUDED ANY NON-STATE-FUNDED PERSONNEL IN
SECTION II ONLY BECAUSE THE COOPERATIVE ASSISTANCE OF THE PER-
SONNEL OF USIS AND THE OFFICE OF THE AGRICULTURAL ATTACHE,
WHILE SUBSTANTIAL IN THE AGGREGATE, DID NOT INVOLVE ANY
INDIVIDUAL EMPLOYEE DEVOTING 20PERCENT OR MORE OF HIS TIME
TO THE CCP, A CRITERION INDICATED IN REF. B.

I. THE INFORMATION REQUESTED FOR SECTIONS II, III,
AND IV OF THE FY-78 CCP FOLLOWS:

2. SECTION II-PERSONNEL RESOURCE LIST

(1.) ALL LISTED PERSONNEL IS STATED FUNDED.

(1.1) THE HAGUE: E/C COUNSELOR O-1; COMMERCIAL COUNSELOR
FSRU-2; ECONOMIC/COMMERCIAL OFFICER O-3; ECONOMIC OFFICER
O-5; ASSISTANT COMMERCIAL ATTACHE O-6; COMMERCIAL OFFICER
R-7; TWO SECRETARIES FSS-6; SENIOR COMMERCIAL ANALYST L-1;
ECONOMIC ANALYST L-2; TWO SENIOR COMMERCIAL ASSISTANTS L-3;
ECONOMIC ANALYST L-4; COMMERCIAL ASSISTANT L-5; SECRETARY L-5;
CLERK STENO L-7; OFFICE CLERK L-7.

TOTAL: 17.

(1.2) AMSTERDAM: COMMERCIAL OFFICER O-4; SENIOR COMMERCIAL
ANALYST L-1; COMMERCIAL ANALYST L-3; SENIOR CLERK STENO L-6;
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CLERK STENO L-7.

TOTAL: 5.

(1.3) ROTTERDAM: COMMERCIAL OFFICER R-4; COMMERCIAL ANALYST L-2;
SENIOR COMMERCIAL ASSISTANT L-3; COMMERCIAL ASSISTANT L-4;
CLERK STENO L-6.

TOTAL: 5.

3. SECTION III-CAMPAIGN DEVELOPMENT

A. CAMPAIGN NO. 1. PRIORITY RANK 1. TITLE: US CONSUMER GOODS. MANAGERS: TIMOTHY C. BROWN/COENRAAD VAN DER KNAAP. OBJECTIVE AND RATIONALE: CONSUMER GOODS, AS DEFINED IN NETHERLANDS, CONSTITUTE 32 PERCENT OF TOTAL PRIVATE DUTCH DOMESTIC EXPENDITURE PROJECTED AT \$61,000 MILLION IN FY-78. IMPORTS ARE EXPECTED TO AMOUNT TO ABOUT \$12,000 MILLION OF WHICH \$450 MILLION, ABOUT 4 PERCENT OF TOTAL IMPORTS, WILL COME FROM THE U.S. THE EEC COUNTRIES DOMINATE THIS SECTOR WITH WEST GERMANY, FRANCE AND ITALY, LEADING SUPPLIERS. GROWING AWARENESS OF U.S. AS SOURCE OF SUPPLY OF AMERICAN CONSUMER GOODS AND CONVERGING TASTES CREATE OPPORTUNITY TO INCREASE U.S. SALES IN NETHERLANDS THROUGH TRADE PROMOTION, SUBSECTORS OF SPECIAL INTEREST ARE HOUSEWARES, CONSUMER DURABLES AND ELECTRONICS, FURNITURE, RECREATION AND LEISURE EQUIPMENT, PERSONAL CARE ITEMS, AND PHOTOGRAPHIC EQUIPMENT AND SUPPLIES. HIGHLIGHTS OF OUR EFFORTS INCLUDE AN IN-STORE PROMOTION IN SEVEN MAJOR SHOPPING CENTERS: SUBMISSION OF FIFTY TO'S DUTCH BUSINESSMEN'S ATTENDANCE AT PARIS USTC AND IMC-ORGANIZED COLOGNE EVENTS, AND CONSUMER PRODUCT FAIRS IN U.S.; AND UP-DATING OF MARKET PROFILES ON SEVERAL SUB-CATEGORIES.

CAMPAIGN ACTIONS:

1. SUBMIT 50 TO'S OBTAINED FROM CALLS ON AND MAILINGS TO CONSUMER GOODS' IMPORTERS IN EIGHT INDIVIDUAL SUB-UNIVERSES: 12, 25, 33, 50.
2. PROMOTE DUTCH BUSINESSMEN'S ATTENDANCE AT INTERNATIONAL HOUSEWARES EXHIBITION, COLOGNE (FEBRUARY 1978) AND PARIS USTC'S SPORTING, RECREATION AND LEISURE-TIME EQUIPMENT SHOW (APRIL 1978): THREE CHECKMARKS, BLANK.

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3. ORGANIZE IN-STORE PROMOTION AT SEVEN SHOPPING CENTERS, WITH ABOUT 500 RETAIL OUTLETS, IN COOPERATION WITH NEDERLANDSCHE MIDDENSTANDBANK, N.V.

4. CALLS ON KEY RETAIL CHAINS, TRADE ORGANIZATIONS AND PUBLICATIONS TO PROMOTE SECTOR: E, 6, 9, 12.
5. PROMOTE DUTCH BUSINESSMEN'S ATTENDANCE AT CONSUMER GOODS TRADE FAIRS IN U.S.: FOUR CHECKMARKS.
6. CONDUCT SAMPLE CHECKS OF PRICES/QUALITY IN RETAIL OUTLETS TO UPDATE INFORMATION BSE: 3, 6, 9, 12.
7. UPDATE UNIVERSE LIST AND MARKET PROFILES ON SEVERAL SUB-CATEGORIES AND REPORT TO WASHINGTON AS WARRANTED: FOUR CHECKMARKS.

B. CAMPAIGN NO. 2. PRIORITY RANK: 3. TITLE: SECURITY AND SAFETY EQUIPMENT.

MANAGERS: RODNEY P. RYDLUN/HENDRIK L. VAN SUCHTELEN
OBJECTIVES AND RATIONALE: NETHERLANDS EXPENDITURES FOR PROTECTION AGAINST ARSON, THEFT, INDUSTRIAL ESPIONAGE, EXTORTION, KIDNAPPING, TERRORIST ACTIVITIES, VANDALISM, AND OTHER CRIME, ARE INCREASING. A 300 PERCENT JUMP IN CRIME AGAINST PROPERTY

HAS OCCURED SINCE 1963. BECAUSE OF THE WIDE RANGE OF PRODUCTS COVERED BY THIS SECTOR, MEANINGFUL STATISTICS ARE NOT AVAILABLE. HOWEVER, IMPORTS OF ELECTRICAL ALARM AND SIGNAL APPARATUS HAVE EXPANDED ANNUALLY BY 10 PERCENT FOR LAST FOUR YEARS AND ARE ESTIMATED AT ABOUT DFL. 31 MILLION IN 1976. THE US SUPPLYING ABOUT DFL. 5 MILLION. ACCORDING TO TRADE SOURCES, AMERICAN SUPPLIERS ARE GAINING ON THEIR BRITISH AND WEST GERMAN COMPETIORS WHO OCCUPY THE FIRST AND SECOND PLACES IN IMPORTS. EFFECTIVE U.S. TRADE PROMOTION CAN LEAD TO INCREMENTAL SALES IN THIS GROWING MARKET. OUR EFFORTS WILL INVOLVE A CATALOG SHOW AT SECURITY '77 UTRECHT: ATTENDANCE BY DUTCH BUSINESSMEN AT TANDEM SECURITY SYSTEMS AND EQUIPMENT EXPOSITION AT STOCKHOLM USTC (APRIL 1978) AND PARIS USTC (MAY 1978); AND CALLS ON THE TRADE TO GENERATE TO'S.

CAMPAIGN ACTIONS:

1. ARRANGE AND HANDLE USDOC CATALOG SHOW AT

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SECURITY '77, UTRECHT (OCT 10-14, '77): CHECKMARK, THREE BLANKS.

2. PERSONAL CALLS ON IMPORTERS AND END USERS TO SECURE ADDITIONAL INFORMATION AND GENERATE 16 TOS: 10, 12, 14, 16.

3. PROMOTE DUTCH BUSINESMENS ATTENDANCE AT TANDEM SECURITY SYSTEMS AND EQUIPMENT EXHIBITION AT STOCKHOLM USTC (APRIL 1978) AND PARIS USTC (AY 1978): BLANK, TWO CHECKMARSK, BLANK.

4. DEVELOP INCREASED TUCH AWARENESS OF US SAFETY AND SECURITY RELATED PRODUCTS BY PUBLICATION IN MEDIA OF USIA-SUPPLIED ARTICLES: 1, 2, 2, 2.

5. MONITOR, ASSIST AND EVALUATE NETHERLANDS GLOBAL MARKET RESEARCH CONTRACT: TWO BLANKS, TWO CHECKMARKS.
C. CAMPAIGN NO. 3. PRIORITY RANK: 4. TITLE: PROCESS CONTROL INSTRUMENTATION AND EQUIPMENT.
MANAGERS: RODNEY P. RYDLUN/ABRAHAM J. GROEN.
OBJECTIVE AND RATIONALE: RISING COSTS OF LABOR, RAW MATERIALS AND EQUIPMENT, AS WELL AS TIGHTER POLLUTION CONTROLS HAVE FOCUSED MUCH INTEREST ON MORE PRECISE CONTROL OF MANUFACTURING PROCESSES. US EXPORTS OF PRODUCTION PROCESS CONTROL INSTRUMENTATION EXCEEDED \$14.5 MILLION IN 1975, A 31 PERCENT JUMP OVER 1973. GOOD POTENTIAL EXISTS FOR INCREMENTAL SALES OF AMERICAN PRODUCTS THROUGH TRADE PROMOTION. OUR PLANNED EFFORTS INCLUDE PROMOTION AND SUPPORT OF TYPE I US EXHIBITION AT PETROTECH, AMSTERDAM; ENCOURAGEMENT OF DUTCH BUSINESSMENS ATTENDANCE AT TWO TRADE FAIRS IN US; TWO USITC SHOWS AND USG PAVILION AT ANALYTICA, MUNICH; SUBMISSION OF TO'S; AND PUBLICATION OF USIA SUPPLIED ARTICLES.
CAMPAIGN ACTIONS:

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1. PROMOTE AND SUPPORT TYPE I US EXHIBITION AT PETROTECH, AMSTERDAM (AY 23-26, 1978); BLANK, TWO CHECKMARKS, BLANK.

2. PROMOTE DUTCH BUSINESSMENS ATTENDANCE AT TWO FBPA EVENTS: 36TH EXPOSITION OF CHEMICAL INDUSTRIES, CHICAGO (DEC 5-8, 1977), AND ISA EXHIBITION, PHILADELPHIA (OCT 15-19 1978); AND THREE EVENTS IN EUROPE: PROCESS CONTROL EQUIPMENT SHOWS AT PARRIS USITC (JAN 1978) AND LONDON USITC (JUN 1978), AND USG PAVILION AT ANALYTICA, MUNICH (APR 1978): FOUR CHECKMARKS.

3. CONTACT KEY IMPORTERS AND END USERS TO SECURE MARKET INFORMATION AND OBTAIN 16 TO'S: 4, 8, 12, 16.

4. MONITOR, ASSIST AND EVALUATE CONTRACT RESEARCH ON THIS SECTOR: BLANK, THREE CHECKMARKS.

5. UPDATE MARKET PROFILE ON THIS SECTOR AND SUBMIT REPORT TO WASHINGTON AS WARRANTED: CHECKMARK, THREE BLANKS.

6. ENCOURAGE PUBLICATION IN MEDIA OF USIA-SUPPLIED ARTICLES ON US TECHNOLOGY AND DEVELOPMENTS IN THIS SECTOR: 1, 2, 2, 2.

D. CAMPAIGN NO. 4. PRIORITY RANK: 5. TITLE: POLLUTION CONTROL EQUIPMENT
MANAGERS: RODNEY P. RYDLUN/ABRAHAM J. GROEN
OBJECTIVE AND RATIONALE: THE NETHERLANDS, ONE OF THE MOST DENSELY POPULATED AND HIGHLY INDUSTRIALIZED COUNTRIES IN THE
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WORLD, HAS PASSED STIFFER LEGISLATION WHICH STRICTLY ENFORCES AIR, WATER AND NOISE POLLUTION. AMERICAN PRODUCTS GENERALLY HAVE TECHNOLOGICAL EDGE ON THOSE OF COMPETITORS IN THIS EXPANDING MARKET. BECAUSE OF DIVERSITY OF PRODUCTS IN THIS SECTOR, MEANINGFUL STATISTICS ARE NOT AVAILABLE. HOWEVER AS AN INDICATION 1975 US EXPORTS TO NETHERLANDS OF FILTRATION AND PURIFICATION EQUIPMENT ONLY AMOUNTED TO ABOUT \$6 MILLION. THE GON ESTIMATES THAT INVESTMENT OF ABOUT \$6,000 MILLION IS NECESSARY BEFORE 1985 TO CLEAN UP ENVIRONMENT. IN ADDITION THE GON ESTIMATES THAT \$1,200 MILLION IS ANNUALLY NEEDED TO MAINTAIN AND IMPROVE ALREADY INSTALLED POLLUTION CONTROLS. DOMESTIC MANUFACTURERS CURRENTLY SUPPLY AN ESTIMATED 60 PERCENT OF THIS MARKET, THE BALANCE BEING COVERED BY IMPORTS. HIGHLIGHTS OF OUR EFFORTS INCLUDE ASSISTANCE AND SUPPORT OF TYPE I EXHIBITION AT PETROTECH, AMSTERDAM (MAY 23-26, 1978); ATTENDANCE OF DUTCH BUSINESSMEN AT USTC SHOWS AND EXHIBITIONS IN US; GENERATION OF 16 TOS THROUGH CALLS AND MAILINGS TO THE TRADE; AND UPDATING OF MARKET PROFILE ON THIS SECTOR AND REPORT TO WASHINGTON AS WARRANTED.

CAMPAIGN ACTIONS:

1. PROMOTE AND SUPPORT TYPE I US EXHIBITION AT PETROTECH, AMSTERDAM (MAY 23-26, 1978); BLANK, TWO CHECKMARKS, BLANK.
2. PROMOTE DUTCH BUSINESSMEN'S ATTENDANCE AT FBP 36TH EXPOSITION OF CHEMICAL INDUSTRIES, CHICAGO (DEC 5-8, 1977); LONDON USTC AIR/WATER TREATMENT AND POLLUTION CONTROL EQUIPMENT SHOW (APRIL 1978); AND FBP ISA EXHIBITION, PHILADELPHIA (OCT 15-19, 1978); FOUR CHECKMARKS.
3. CONTACT KEY IMPORTERS AND END USERS TO SECURE ADDITIONAL MARKET INFORMATION AND OBTAIN 16TOS: 4, 8, 14, 16.
4. UPDATE MARKET PROFILE ON THIS SECTOR AND SUBMIT REPORT TO WASHINGTON AS WARRANTED: CHECKMARK, THREE BLANKS.
5. MONITOR ASSIST AND EVALUATE CONTRACT RESEARCH ON THIS SECTOR: BLANK, THREE CHECKMARKS.
6. ENCOURAGE PUBLICATION IN MEDIA OF USIA SUPPLIED ARTICLES

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ON US PROMINENT POSITION IN THIS SECTOR: BLANK, 2, 2, 2.
E. CAMPAIGN NO 5. PRIORITY RANK: 6. TITLE: CHEMICAL AND PETROCHEMICAL INDUSTRIES.
MANAGERS: JOHN C. HOLZMAN/BENARD T.G. KENNEDY
OBJECTIVE AND RATIONALE: THE CHEMICAL INDUSTRY IS THE THIRD LARGEST IN THE NETHERLANDS WITH SALES OF ABOUT \$6,800 MILLION IN

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1975. THE GON FORECASTS ANNUAL GROWTH IN THE INDUSTRY AT 7 PERCENT FOR THE NEXT 10 YEARS, WHICH SHOULD LEAD TO SALES OF ABOUT \$9,500 MILLION BY 1980. INVESTMENT IN PLANT AND EQUIPMENT BY THE CHEMICAL AND PETROLEUM INDUSTRIES AMOUNTED TO ABOUT \$635 MILLION IN 1975, IS ESTIMATED AT \$900 MILLION IN 1976, AND IS PROJECTED AT \$1,050 MILLION IN 1977. OVER THE LONGER TERM, THE GON EXPECTS INVESTMENT IN THESE INDUSTRIES TO GROW AT ANNUAL RATE OF 8 PERCENT. ACCORDING TO DUTCH CENTRAL BUREAU OF STATISTICS, US EXPORTS OF EQUIPMENT FOR THE CHEMICAL INDUSTRY AMOUNTED TO \$8.5 MILLION OUT OF \$140 MILLION TOTAL IMPORTS. THIS CAMPAIGN WILL AIM AT INCREASING US EXPORTS BY EMPHASIZING PRODUCTIVITY GAINS THAT COULD BE REALIZED THROUGH PURCHASE OF TECHNOLOGICALLY ADVANCED AMERICAN EQUIPMENT. HIGHLIGHTS OF OUR EFFORTS WILL BE PROMOTION AND SUPPORT OF A TYPE I PAVILION AT PETROTECH, SUBMISSION OF 30 TO'S, DUTCH BUSINESSMEN'S ATTENDANCE AT FBP 36TH EXPOSITION OF CHEMICAL INDUSTRIES, AND UPDATING OF MARKET PROFILE ON THIS SECTOR.

CAMPAIGN ACTIONS:

1. PROMOTE AND SUPPORT TYPE I US EXHIBITION AT PETROTECH, AMSTERDAM (MAY 23-26, 1987): BLANK, TWO CHECKMARKS, BLANK.
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2. PROMOTE DUTCH BUSINESSMEN'S ATTENDANCE AT FBP 35TH EXPOSITION OF CHEMICAL INDUSTRIES (CHEM-SHOW '77), CHICAGO (DECEMBER 5-8, 1977): CHECKMARK, THREE BLANKS.

3. FIFTEEN CALLS ON KEY IMPORTERS AND END USERS TO SECURE ADDITIONAL MARKET INFORMATION; TO SOLICITATION DURING THESE CALLS AND THROUGH MAILINGS.

A) NUMBER OF PERSONAL CALLS: 5,10,15,15.

B) NUMBER OF TO'S: 10,20,25,30.

4. UPDATE MARKET PROFILE ON THIS SECTOR AND REPORT TO WASHINGTON AS WARRANTED.

5. ENCOURAGE PUBLICATION OF USIA SUPPLIED ARTICLES ON THIS SECTOR: BLANK, CHECKMARK, TWO BLANKS.

F. CAMPAIGN NO 6. PRIORITY RANK: 7. TITLE: COMPUTERS AND PERIPHERAL -- BUSINESS EQUIPMENT AND SYSTEMS. MANAGERS: TIMOTHY C. BROWN/RUDOLF KEPEL.

OBJECTIVE AND RATIONALE: THE TREND OF BUSINESS SYSTEMS TO INCORPORATE COMPUTER TECHNOLOGY AND HARDWARE IS ACCELERATING, THUS CAUSING AN INCREASING OVERLAPPING OF THESE TWO SECTORS. THAT IS WHY THEY ARE COVERED BY ONE CAMPAIGN. ALTHOUGH AMERICAN MANUFACTURERS DOMINATE THE LARGE COMPUTER MARKET, STRONG COMPETITION IS DEVELOPING IN THE FAST GROWING FIELDS OF BUSINESS SYSTEMS, MINI-COMPUTERS AND MICRO-COMPUTERS, INCLUDING PERIPHERALS AND ALLIED SYSTEMS SUCH AS WORD PROCESSORS. OVERALL NETHERLANDS IMPORTS ARE EXPECTED TO REACH \$320 MILLION IN FY-1978 WITH US SHARE OF ABOUT \$95 MILLION OF 30 PERCENT. POSSIBLE INCREASED SALES OF MAINFRAMES AND INTEGRATED DATA SYSTEMS MIGHT BOOST OUR EXPORTS ABOVE \$100 MILLION MARK. NETHERLANDS IMPORTS OF BUSINESS EQUIPMENT AND MACHINES TOTALED DFL 630 MILLION IN CY-1976. THEY ARE EXPECTED TO REACH DFL 690 MILLION IN FY-78 DURING UNCLASSIFIED

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WHICH WE EXPECT AT LEAST TO MAINTAIN OUR MARKET SHARE OF 12-14 PERCENT OR ABOUT DFL 100 MILLION. DUTCH FIRMS ARE ESPECIALLY ATTRACTED BY LABOR SAVING SYSTEMS AND THERE IS GROWING TREND TO USE INTEGRATED SALE, INVENTORY AND REORDER CONTROL SYSTEMS BY RETAIL CHAINS AND DEPARTMENT STORES. PROMOTION OF AMERICAN PRODUCTS IN THIS NEW SYSTEM MARKET TO SATISFY DEMAND, COULD LEAD TO INCREASED US SALES TO DFL 135 MILLION AND OUR MARKET SHARE TO 20 PERCENT. OUR ACTIVITIES INCLUDE A USDOC CATALOG SHOW; DUTCH BUSINESSMEN'S ATTENDANCE AT FOUR EVENTS IN EUROPE; AND NATIONAL COMPUTER CONFERENCE, CHICAGO (JUNE 1978); TO'S; AND UPDATING OF SECTOR PROFILES.

CAMPAIGN ACTIONS:

1. ORGANIZED CATALOG SHOW AT EFFICIENCY BEURS '78, AMSTERDAM (SEPTEMBER 1978, SUBJECT TO WASHINGTON APPROVAL.

2. CONTACT IMPORTERS' ORGANIZATIONS AND KEY IMPORTERS TO SECURE MARKET INFORMATION AND OBTAIN 32 TO'S:8, 16,24,32.

3. PROMOTE DUTCH BUSINESSMEN'S ATTENDANCE AT FOUR EVENTS IN EUROPE; US PAVILION AT SYSTEMS '77, MUNICH (OCTOBER 1977); LONDON USTC'S MINI/MICRO COMPUTERS (JANUARY 1978); PARIS USTC'S PRINTEMPS INFORMATIQUE (MARCH 1978); NATIONAL COMPUTER CONFERENCE, CHICAGO (JUNE 1978): THREE CHECKMRKS, BLANK.

4. UPDATE UNIVERSE LISTS, AS WELL AS SECTORAL MARKET PROFILES AND REPORT TO WASHINGTON AS WARRANTED. THIS COULD GENERATE ADDITIONAL TO'S: FOUR CHECKMARKS.

G. CAMPAIGN NO 7. PRIORITY RANK: 8. TITLE: LABORATORY INSTRUMENTS. MANAGERS: BENOIT O. BROOKENS/PETRONELLA VAN GORKOM.

OBJECTIVE AND RATIONALE: THE EXPANDED RESEARCH AND DEVELOPMENT ACTIVITIES OF THE GON AND DUTCH COMPANIES, PARTICULARLY IN THE UNCLASSIFIED

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CHEMICALS, METALS, ELECTRONICS, AND ENERGY SECTORS, ARE EXPECTED TO LEAD TO INCREASED MARKET DEMAND FOR LABORATORY INSTRUMENTS. CURRENT ANNUAL CONSUMPTION OF THESE INSTRUMENTS IS ESTIMATED AT \$160 MILLION, HALF OF WHICH IS COVERED BY IMPORTS. OUR EXPORTS HAVE JUMPED FROM \$13 MILION IN 1973 TO \$21.5 MILLION IN 1975, THUS TAKING ABOUT A 27 PERCENT SHARE OF THE IMPORT MARKET. WEST GERMANY CONTINUES TO BE OUR STRONGEST COMPETITOR. TRADE PROMOTION SHOULD LEAD TO INCREASED US EXPORTS IN THIS SECTOR, ESPECIALLY SINCE US PRODUCTS ENJOY AN EXCELLENT REPUTATION. OUR ACTIVITIES INCLUDE THE DEVELOPMENT OF TO'S, THE HANDLING OF A PLANNED US TRADE MISSION, AND THE PROMOTION OF ATTENDANCE BY DUTCH BUSINESSMEN AT THE US PAVILION AT PRODUCTRONICA '77 MUNICH.

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CAMPAIGN ACTIONS:

1. MAKE PERSONAL CALLS AND MAILINGS TO IMPORTERS, END USERS AND GOVERNMENT ORGANIZATIONS TO SECURE MARKET INFORMATION AND 25 TO'S: 10, 15, 20, 25.
2. PROMOTE DUTCH BUSINESSMENS VISIT TO US PAVILION AT PRODUCTRONICA '77, MUNICH (NOV 77).
3. MAKE ARRANGEMENTS FOR PLANNED LABORATORY INSTRUMENT TRADE MISSION TO BENELUX (JAN 78): TWO CHECKMARKS, TWO BLANKS.
4. UPDATE UNIVERSE LISTS, AS WELL AS MARKET PROFILE ON THIS SECTOR AND REPORT TO WASHINGTON AS WARRANTED: TWO CHECKMARKS, TWO BLANKS.

4. SECTION IV - OTHER SPECIAL POST EFFORTS:

A. ACTIVITY NO. 1. PRIORITY 2. ENERGY SYSTEMS.

PRIMARY RESPONSIBILITY: JOHN C. HOLZMAN/FRANK R. BAULING

DESCRIPTION/JUSTIFICATION: THE US IS BY FAR THE LARGEST SUPPLIER TO THE NETHERLANDS OF OIL AND GAS DRILLING EQUIPMENT.

IMPORTS COVER PRACTICALLY THE ENTIRE DEMAND BECAUSE DOMESTIC PRODUCTION IS MARGINAL. OUR EXPORTS TO THE NETHERLANDS IN 1975 AMOUNTED TO \$55 MILLION OUT OF ESTIMATED TOTAL IMPORTS OF \$80 MILLION. WE EXPECT OUR EXPORTS TO GROW AT AN ANNUAL RATE OF 10-20 PERCENT TO COVER REPLACEMENT AND EXPANDED ACTIVITY

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NEEDS. IN THE ELECTRICITY GENERATION SECTOR, THE NETHERLANDS PLANS TO EXPAND AND DIVERSIFY ITS CAPACITY. ANNUAL CAPITAL EXPENDITURES IN THIS SECTOR WILL HOVER AROUND \$1,000 MILLION. US EXPORTS OF ELECTRIC POWER GENERATION EQUIPMENT IN 1975 REACHED \$9 MILLION. THE GON IS CURRENTLY CONSIDERING TWO LARGE PROJECTS. IF IMPLEMENTED, THEY COULD GENERATE SIZEABLE ADDITIONAL US EXPORTS. THE OFT POSTPONED DECISION REGARDING THE CONSTRUCTION OF THREE NUCLEAR PLANTS SHOULD BE MADE BEFORE THE END OF 1977; THE STATE OWNED ENERGY DEVELOPMENT COMPANY (NEOM) HAS ANNOUNCED PLANS FOR A LARGE SCALE COAL GASIFICATION PROJECT REQUIRING AN INVESTMENT OF \$200 MILLION. HIGHLIGHTS

OF OUR EFFORTS WILL BE THE PROMOTION AND SUPPORT OF PLANNED US TYPE I PARTICIPATION IN PETORTECH: PROMOTION OF DUTCH BUSINESSMENS ATTENDANCE AT 1978 OFFSHORE TECHNOLOGY CONFERENCE; SOLICITATION OF TO'S AND REPORTING ON ABOVE TWO MAJOR PROJECTS.

ACTIONS TO BE TAKEN:

1. PROMOTE AND SUPPORT PLANNED US TYPE I PARTICIPATION IN PETORTECH (MAY 23 26, 1978).
2. CONDUCT SOLICITATION CAMPAIGN TO SECURITY 20 TOS.
3. PROMOTE DUTCH BUSINESSMENS ATTENDANCE AT 1978 OFFSHORE TECHNOLOGY CONFERENCE, HOUSTON (MAY 1978).
4. MONITOR DEVELOPMENTS REGARDING THE PLANNED THREE NUCLEAR PLANT, AS WELL AS THE COLA GASIFICATION PROJECT, AND REPORT TO WASHINGTON AS WARRANTED.
5. UPDATE MARKET PROFILE ON OIL AND GAS DRILLING EQUIPMENT. SECTOR AND REPORT TO WASHINGTON AS WARRANTED.

B. ACTIVITY NO. 2. PRIORITY 9. VISIT USA

PRIMARY RESPONSIBILITY: BENOIT O. BROOKENS/ADRIANA SLINGERLAND
DESCRIPTION/JUSTIFICATION: NETHERLANDS RESIDENTS LIKE TO TRAVEL ABROAD. DUTCH ARRIVALS IN THE US HAVE STEADILY INCREASED IN RECENT YEARS REACHING AN ESTIMATED 95,000 IN 1976, AGAINST 73,961 IN 1975- AN INCREASE OF OVER 28 PERCENT. OUR RESULTING TOURIST RECEIPTS ALSO JUMPED BY ONE THIRD, REACHING \$48 MILLION IN 1976 COMPARED WITH \$36 MILLION THE
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PREVIOUS YEAR. THUS THE NETHERLANDS WITH A POPULATION OF LESS THAN 14 MILLION, RANKED ELEVENTH IN THE LIST OF THE TOP TOURIST GENERATING COUNTRIES. THERE IS STILL NEED TO FAMILIARIZE THE DUTCH TRAVEL TRADE WITH ATTRACTIVE US DESTINATION AND THE PROFITABILITY OF ENCOURAGING INDIVIDUAL TRIPS AND TOURS TO THE US. MOST TRAVEL AGENTS AND OPERATORS ARE MUCH BETTER ORGANIZED FOR TOURIST TRAVEL TO DESTINATION IN OTHER FOREIGN COUNTRIES. THE LATTER ALSO HAVE BETTER FINANCED AND STAFFED TOURIST PROMOTION FACILITIES IN THE NETHERLANDS. THIS MAKES IT ALL THE MORE IMPORTANT THAT WE PUT TO MAXIMUM USE THE US LIMITED TOURIST PROMOTION CAPABILITIES. WE WERE ABLE TO MAKE GOOD PROGRESS IN 1976 THANKS MOSTLY TO THE EFFECTIVE COOPERATION OF USTS/WASHINGTON AND LONDON IN SENDING US TOURIST LITERATURE, AND INDISPENSABLE TOOL OF OUR PROMOTION EFFORTS. OUR ACTIVITIES WILL INCLUDE EFFORTS TO INCREASE RECEIPT AND USE OF TOURIST PUBLICATIONS FROM USTS, STATE OFFICES, AND OTHERS; TO EXPAND THE FAMILIARIZATION OF THE DUTCH TRAVEL TRADE WITH THE US THROUGH DOCUMENTS, THE COMMERCIAL NEWSLETTER AND A SEMINAR: AND THE PUBLICATION OF TOURISM ARTICLES IN THE DUTCH MEDIA.

ACTIONS TO BE TAKEN:

1. SECURE TOURIST PUBLICATIONS FROM USTS, STATE OFFICES, CITY CONVENTION BUREAU AND OTHERS.

2. GUIDANCE TO AND SUPPORT OF THE VOLUNTEERS MANNING THE VISIT US TOURIST INFORMATION SERVICE BOOTH IN AMSTERDAM AND THE VISIT US FOUNDATION SPONSORS.
3. ORGANIZE AND COORDINATE A USA DESTINATION PROMOTION CAMPAIGN LEADING TO A SEMINAR FOR THE DUTCH TRAVEL INDUSTRY.
4. IMPROVE AND EXPAND THE "TRAVEL INDUSTRY NEWS" SECTION IN THE EMBASSY COMMERCIAL NEWSLETTER.
5. ENCOURAGE PUBLICATION IN THE DUTCH MEDIA OF ARTICLES ON THE US AS A TOURIST DESTINATION.
6. SUPPORT AIRLINES IN SECURING CABIN WAIVERS FOR FREE TRIPS TO THE US PARTICULARLY OF JOURNALISTS AND TRAVEL INDUSTRY EXECUTIVES.

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CIAE-00 INR-07 NSAE-00 ERDA-07 ERDE-00 NRC-07 CAB-05
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FM AMEMBASSY THE HAGUE
TO SECSTATE WASHDC PRIORITY 9864
USDOC WASHDC PRIORITY
INFO AMEMBASSY BRUSSELS

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C. ACTIVITY NO. 3. PRIORITY 10. AUTOMOTIVE PARTS AND ACCESSORIES, AND GARAGE EQUIPMENT.
PRIMARY RESPONSIBILITY: JOHN C. HOLZMAN/BERNARD T.G. KENNEDY
DESCRIPTION/JUSTIFICATION: IN 1976, DUTCH EXPENDITURES ON AUTOMOTIVE PARTS AND ACCESSORIES WERE ESTIMATED AT OVER \$880 MILLION COMPARED WITH AN ESTIMATED \$712 MILLION IN 1975, AN INCREASE OF 24 PERCENT. THOSE FOR GARAGE EQUIPMENT WERE ESTIMATED AT \$51 MILLION IN 1975 AND \$63 MILLION IN 1976, AN INCREASE OF 23 PERCENT. IMPORTS SATISFIED A LARGE SHARE OF DEMAND. FOR PARTS AND ACCESSORIES, THEY REACHED \$553 MILLION IN 1975, OF WHICH \$25 MILLION CAME FROM THE U.S. IN 1976, THEY ROSE TO AN ESTIMATED \$625 MILLION AND \$29 MILLION RESPECTIVELY. IMPORTS OF GARAGE EQUIPMENT INCREASED FROM \$37 MILLION IN 1975 TO AN ESTIMATED \$41 MILLION IN 1976, WITH THE U.S. SUPPLYING \$3 MILLION IN 1975 AND \$3.3 MILLION IN 1976. FUTURE INDICATIONS ARE THAT VEHICLES WILL BE KEPT

LONGER, RESULTING IN AN EXPANDING MARKET FOR AUTOMOTIVE PARTS AND ACCESSORIES, AS WELL AS GARAGE EQUIPMENT. THE ANTICIPATED INTRODUCTION OF COMPULSORY PERIODIC SAFETY CHECKS AND THE RISING LABOR COSTS IN THE NETHERLANDS WILL ALSO STIMULATE ADDITIONAL INVESTMENT IN GARAGE EQUIPMENT. OUR ACTIVITIES WILL INCLUDE THE PROMOTION OF DUTCH BUSINESSMEN'S ATTENDANCE AT

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AN FBP TRADE FAIR IN U.S., AND TO'S.

ACTIONS TO BE TAKEN:

1. PROMOTE ATTENDANCE OF DUTCH BUSINESSMEN AT THE FBP AUTOMOTIVE PARTS AND ACCESSORIES SHOE, CHICAGO (NOVEMBER 15-17, 1977.)
2. CONDUCT A TO SOLICITATION THROUGH PERSONAL CALLS AND MAILINGS AND CONTACTS WITHSELECTED EXHIBITORS AT THE COMMERCIAL VEHICLE EXHIBITION, AMSTERDAM (FEBRUARY 1978) TO SECURE 20 TO'S.

3. UPDATE MARKET PROFILE ON THIS COMBINED SECTOR AND REPORT TO WASHINGTON AS WARRANTED.

D. ACTIVITY NO. 4. PRIORITY 11. HEALTH CARE EQUIPMENT.

PRIMARY RESPONSIBILITY: BENOIT O.. BROOKENS/ADRIANA SLINGERLAND.

DESCRIPTION JUSTIFICATION: THIS MARKET SHOWED CONSIDERABLE GROWTH DURING THE LAST FIVE YEARS, BUT THE CURRENT TREND IS TOWARDS SLOWER GROWTH FOR THE NEXT FEW YEARS. TOTAL NETHERLANDS MARKET IN 1975 FOR HEALTH CARE EQUIPMENT WAS ESTIMATED AT \$215 MILLION, OF WHICH ABOUT \$165 MILLION WAS IMPORTED. 1975 U.S. EXPORTS AMOUNTED TO \$27.5 MILLION AND REPRESENTED OVER 16 PERCENT OF TOTAL IMPORTS. OUR SALES ARE EXPECTED TO RISE BECAUSE OF PLANNED PURCHASESOF EQUIPMENT FOR NEW HOSPITAL FACILITIES, REPLCEMENT OF OBSOLETE OR WORN-OUT EQUIPMENT, OUR ADVANCED TECHNOLOGY, COMPETITIVE PRICES, AS WELL AS INCREASED ACCEPTANCE OF AMERICAN PRODUCTS.OUR ACTIVITIESZ WILLINCLUDE DEVELOPMENT OF TO'S , PROMOTIN OF DUTCH BUSINESSMEN'S ATTENDANCE AT AN FBP EVENT INTHE U.S., AND AN EXHIBITION AT THE LONDON USTC: AND UPDATING OF THE MARKET PROFILE ON THIS SECTOR.

ACTIONS TO BE TAKEN:

1. CALLS AND MAILINGS TO KEY IMPORTERS TO SECURE MARKET INFORMATION AND DEVELOP 20 TO'S : T, 10, 15, 20.
 2. PROMOTE DUTCH BUSINESSMEN'S ATTENDANCE AT LONDON USTC'S MEDICAL EQUIPMENT SHOW (MAY 1978), AND FBP AMERICAN HOSPITAL ASSOCIATION CONVENTION, ANAHEIM, CALIFORNIA (SEPTEMBER 11-14,
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1978).

3. UPDATE UNIVERSE LISTS AND MARKET PROFILE ON THIS SECTOR,
AND REPORT TO WASHINGTON AS WARRANTED.

E. ACTIVITY NO.5. PRIORITY QWM FOOD PROCESSING AND PACKAGING
EQUIPMENT.

PRIMARY RESPONSIBILITY: RODNEY P. FYDLUN/ABRAHAM J. GROEN.

DESCRIPTION/JUSTIFICATION: DESPITE STRONG COMPETITION FROM WEST
GERMANY, SUPPLIER OF OVER HALF OF TOTAL DUTCH IMPORTS, AND
INCREASING LOCAL PRODUCTION, THE U.S. IS STILL THE SECOND
LARGEST FOREIGN SUPPLIER OF THIS EQUIPMENT. MOSTLY DUE TO THE
RECESSION IN THE NETHERLANDS, 1975 IMPORTS OF FOOD PROCESSING AND
PACKAGING EQUIPMENT FROM U.S. AMOUNTED TO DFL. 46 MILLION OR
ABOUT 30 PERCENT LESS THAN RECORD 1974 IMPORTS OF DFL. 65 MILLION
HOWEVER, 1976 IMPORTS FROM U.S. HAVE REGAINED GROUND AND
REACHED DFL. 52. WITH APPROPRIATE PROMOTION EFFORTS, PAR-
TICULARLY OF ADVANCED TECHNOLOGY EQUIPMENT, INCREMENTAL U.S.
SALES COULD BOOST OUR SHARE OF THIS MARKET. OUR ACTIVITIES
WILL INCLUDE A USDOC CATALOG EXHIBITION AT MACHEVO: PROMOTION
OF DUTCH BUSINESSMEN'S ATTENDANCE AT TWO FBP TRADE FAIRS IN
U.S.: AND TO'S

ACTIONS TO BE TAKEN:

1. PROMOTION AND ARRANGEMENTS FOR USDOC CATALOG EXHIBITION
AT MACHEVO, UTRECHT (SEPTEMBER/OCTOBER 1978), SUBJECT TO
WASHINGTON APPROVAL.

2. PROMOTION OF DUTCH BUSINESSMEN'S ATTENDANCE AT FBP NATIONAL
ASSOCIATION OF FOOD EQUIPMENT MANUFACTURERS SHOW--NAFEM/77,
NEW ORLEANS (SEPTEMBER 24-27, 1977), AND INTERNATIONAL EXPL-
SITION FOR FOOD PROCESSORS, CHICAGO (FEBRUARY 12-15, 1978).

3. MAKE CALLS ON KEY IMPORTERS TO SECURE MARKET INFORMATION
AND 10 TO'S.

4. MONITOR, ASSIST AND EVALUATE NETHERLANDS GLOBAL MARKET
RESEARCH CONTRACT.

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TO SECSTATE WASHDC PRIORITY 9865
USDOC WASHDC PRIORITY
INFO AMEMBASSY BRUSSELS

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F. ACTIVITY NO. 6. PRIORITY 15. BUILDING AND CONSTRUCTION MATERIALS AND EQUIPMENT.
PRIMARY RESPONSIBILITY: RODNEY P. RYDLUM/HENRIK L. VAN SUCHTELEN
DESCRIPTION/JUSTIFICATION: HIGH COSTS OF LABOR, EQUIPMENT AND MATERIALS ARE FORCING CHANGES IN THIS ONE OF THE LARGEST INDUSTRIAL SECTORS IN NETHERLANDS. THESE CHANGES ARE BENEFICIAL TO US SUPPLIERS, ESPECIALLY BECAUSE DUTCH BUILDING TECHNIQUES ARE BECOMING MORE CLOSELY ALIGNED WITH THOSE IN THE US. AMERICAN PRODUCTS HAVE ALSO BECOME MORE COMPETITIVE. US EXPORTS TO THE NETHERLANDS OF BUILDING SUPPLIES EQUIPMENT AND FIXTURES REACHED \$32 MILLION IN 1975, THUS CONTINUING A FIVE YEAR ADVANCE. STRONGEST GAINS HAVE BEEN IN US SALES OF EXTERIOR PLYWOOD, CAST IRON SOIL PIPE, PLASTIC CONSTRUCTION PIPE, PRE FABRICATED AND PORTABLE BUILDINGS, AND LARGER AIR-CONDITIONERS. US PRODUCTS ENJOY INCREASING ACCEPTABILITY WHICH CAN BE IMPROVED WITH TRADE PROMOTION EFFORTS. OUR ACTIVITIES INCLUDE A USDOC CATALOG EXHIBITION, PROMOTION OF DUTCH BUSINESSMENS ATTENDANCE AT TWO FBP TRADE FAIRS IN US, AND A USTC STOCKHOLM EVENT; TO'S AND PUBLICATION OF USIA SUPPLIED ARTICLES.

ACTIONS TO BE TAKEN:

1. PROMOTE AND ORGANIZE A SOLO USDOC CATALOG EXHIBITION AT UNCLASSIFIED

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BOUWCENTRUM, ROTTERDAM (MARCH 1978) IN TANDEM WITH SIMILAR EXHIBITION AT BATIBOUW, BRUSSELS.

2. PROMOTE DUTCH BUSINESSMENS ATTENDANCE AT FBP BUILDING AND CONSTRUCTION EXPOSITION AND CONFERENCE CHICAGO NOV 1-3, 1977, AND 1978 INTERNATIONAL CONCRETE AND AGGREGATES SHOW, LAS VEGAS (JAN 22-26, 1978), AS WELL AS STOCKHOLM USTC'S HEATING, VENTILATING AND AIRCONDITIONING EQUIPMENT EXHIBITION (NOV 1977).
3. THROUGH PERSONAL CALLS ON KEY IMPORTERS AND MAILINGS, DEVELOP 20 TO'S.
4. UPDATE UNIVERSE LIST AND MARKET PROFILE ON THIS SECTOR AND REPORT TO WASHINGTON AS WARRANTED.
5. ARRANGE PUBLICATION OF USIA SUPPLIED ARTICLES ON SELECTED PRODUCTS AND TECHNOLOGIES.

G. ACTIVITY NO. 7. PRIORITY 16. ELECTRONIC INDUSTRY PRODUCTION AND TEST EQUIPMENT.
PRIMARY RESPONSIBILITY: TIMOTHY C. BROWN/ RUDOLF KEPEL
DESCRIPTION/JUSTIFICATION: US EXPORTS TO NETHERLANDS OF

ELECTRONIC PRODUCTION AND TEST EQUIPMENT MUST COMPETE WITH SUBSTANTIAL LOCAL PRODUCTION (VALUED AT ABOUT \$5,000 MILLION AND DOMINATED BY PHILIPS) AND WITH MANUFACTURERS OPERATING WITHIN THE EEC. WEST GERMANY IS OUR STRONGEST COMPETITOR. HOWEVER THE US IS THE SECOND LARGEST FOREIGN SUPPLIER IN THIS MARKET. IMPORTS COVER A SMALL PART OF TOTAL CONSUMPTION. THEY ARE EXPECTED TO EXCEED \$50 MILLION IN FY 78. THE US SHARE COULD INCREASE TO OVER 20 PERCENT OF \$11-12 MILLION WITH THE HELP OF TRADE PROMOTION EFFORTS. OUR ACTIVITIES WILL INCLUDE SOLICITATION OF TOS; AND PROMOTION OF DUTCH BUSINESSMENS ATTENDANCE AT PARIS USTC EXHIBITION AND US PAVILION AT PRODUCTRONIC '77, AS WELL AS RACE FAIRS IN US. ACTIONS TO BE TAKEN:

1. GENERATE 10 TOS FROM PERSONAL CALLS ON LEADING IMPORTERS.
 2. PROMOTE DUTCH BUSINESSMENS ATTENDANCE AT PARIS USTC ELECTRONIC PRODUCTION AND TEST EQUIPMENT AND US PAVILION AT PRODUCTRONIC '77, MUNICH BOTH IN NOV 1977, AS WELL AS
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THE ELECTRONIC, OPTICS, LASER SHOW, ANAHEIM CALIF (OCT 1977) AND NEPCON CENTRAL, ROSEMONT, ILLINOIS (SEPT 1978). THIS EXHIBITION FEATURES PRODUCTION EQUIPMENT TOOLS, HARDWARE, PRODUCTION HARDWARE AND SUPPLIES FOR DEVELOPMENT PROCESSING AND TESTING AND ELECTRONIC CIRCUIT EQUIPMENT AND SEMI CONDUCTOR DEVICES.

3. UPDATE UNIVERSE LIST AND MARKET PROFILE ON THIS SECTOR.

H. ACTIVITY NO. 8. PRIORITY 17. ELECTRONIC COMPONENTS. PRIMARY RESPONSIBILITY: TIMOTHY C. BROWN/RUDOLF KEPEL DESCRIPTION/JUSTIFICATION: THE NETHERLANDS ELECTRONIC COMPONENTS MARKET IS SUBSTANTIAL. IMPORTS IN FY -78 ARE EXPECTED TO REACH ABOUT \$220 MILLION WITH A US SHARE OF \$10 MILLION. ADVANCED US TECHNOLOGY AND COMPETITIVE PRICES FAVOR GROWTH OF US EXPORTS. OF SPECIFIC INTEREST ARE MICRO-PROCESSORS, ELECTRONIC OPTICS, INTEGRATED CIRCUITS, AND CABLE TV ACCESSORIES. OUR ACTIVITIES WILL INCLUDE A USDOC CATALOG SHOW AT FIAREX '78, THIS INTERNATIONAL FAIR HAVING PROVED TO BE AN EXCELLENT VEHICLE FOR INCREASING US EXPORTS (SEE ADAM --15, NOV 30, 76); TOS: PROMOTION OF DUTCH BUSINESSMENS ATTENDANCE AT LONDON AND STOCKHOLM USTC EXHIBITIONS, AND WESCON IN SAN FRANCISCO. ACTIONS TO BE TAKEN:

1. PROMOTE AND MARKET ARRANGEMENTS FOR USDOC CATALOG SHOW AT FIAREX '78, AMSTERDAM (SEPT/OCT 78), SUBJECT TO WASHINGTON APPROVAL.
2. GENERATE 15 TOS FROM PERSONAL CALLS ON LEADING IMPORTERS.
3. PROMOTE DUTCH BUSINESSMENS ATTENDANCE AT LONDON USTCS ELECTRONIC COMPONENTS EXHIBITION (NOV 1977) AND SIMILAR EVENT AT USTC STOCKHOLM (FEB 1978); AS WELL AS

WESCON (WESTERN ELECTRONICS SHOW), SAN FRANCISCO (SEPT 78).

4. UPDATE UNIVERSE LIST AND MARKET PROFILE ON THISSECTOR.

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TO SECSTATE WASHDC PRIORITY 9866
USDOC WASHDC PRIORITY
INFO AMEMBASSY BRUSSELS

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I. ACTIVITY NO 9. PRIORITY 13. ASSISTANCE TO USTC'S IN
EUROPE.
PRIMARY RESPONSIBILITY: COMMERCIAL STAFF, THE HAGUE,
AMSTERDAM, ROTTERDAM.

DESCRIPTION/JUSTIFICATION: OUR EXPANDED ASSISTANCE IN THE LAST
YEAR TO THE US TRADE CENTERS IN FRANKFURT, LONDON,
PARIS AND ON AN EXPERIMENTAL BASIS, STOCKHOLM, HAS RESULTED
IN INCREASED NUMBERS OF DUTCH BUSINESSMEN'S VISITS TO MAJOR
EVENTS IN THESE USTC'S. THIS WAS MADE POSSIBLE BY THE POSITIVE
COOPERATION OF USDOC AND THE USTC'S THEMSELVES IN MAKING
AVAILABLE TO US INFORMATION AND DOCUMENTS MORE QUICKLY, AS
SUGGESTED IN THE HAGUE 5219, OCTOBER 14, 1975. HOWEVER, THE
RECOMMENDATIONS IN THE HAGUE 5219 HAVE NOT YET BEEN ADEQUATELY
OR UNIFORMLY IMPLEMENTED BY USDOC AND THE USTC'S. WE HOPE
THIS WILL BE DONE SINCE IT WILL IMPROVE THE EFFECTIVENESS
OF OUR ASSISTANCE TO THE USTC'S IN EUROPE.

ACTIONS TO BE TAKEN:

1. CONTINUE TO EXPAND OUR EFFORTS TO PROMOTE DUTCH BUSINESS-
MEN'S ATTENDANCE AT MAJOR EVENTS OF USTC'S IN LONDON, PARIS AND
STOCKHOLM, AND US PAVILIONS AT INTERNATIONAL TRADE FAIRS IN
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EUROPE ORGANIZED BY THE COLOGNE US INTERNATIONAL MARKETING CENTER (IMC).

2. TO EXTENT POSSIBLE, ORGANIZE GROUP FLIGHTS TO ABOVE EVENTS.

3. WORK CLOSELY WITH USDOC, USTC' AND COLOGNE IMC ON INDIVIDUAL EXHIBITIONS.

4. FOLLOW UP WITH IDENTIFIED DUTCH VISITORS TO US SPONSORED EVENTS TO ASCERTAIN RESULTS AND REPORT TO WASHINGTON, USTC'S AND COLOGNE IMC AS WARRANTED.

J. ACTIVITY NO 10. PRIORITY 14. THE FOREIGN BUYER PROGRAM (FBP).

PRIMARY RESPONSIBILITY: COMMERCIAL STAFF, THE HAGUE, AMSTERDAM, ROTTERDAM.

DESCRIPTION/JUSTIFICATION: OUR EXPANDED EFFORTS IN THE LAST YEAR HAVE INCREASED DUTCH BUSINESSMEN' ATTENDANCE AT FBP TRADE FAIRS IN THE US. WE WILL CONTINUE OUR SUPPORT OF THE FOREIGN BUYER PROGRAM, NOT ONLY AS AN INTEGRAL PART OF OUR CCP CAMPAIGN AND OTHER SPECIAL POST EFFORTS, BUT WE WILL ALSO EXTEND IT TO ALL FBP EVENTS. THE TIMELY RECEIPT (PREFERABLY THREE MONTHS BEFORE THE INDIVIDUAL EVENT) OF BROCHURES AND "EXHIBITORS LISTS" PLAYS A MAJOR ROLE FOR A MORE EFFECTIVE PROMOTION OF THESE EXHIBITIONS. WE UNDERSTAND THAT USDOC HAS REVUEWED OUR RECOMMENDATION THAT COMMERCE OR THE FAIR MANAGERMENTS CONSIDER SENDING AUTOMATICALLY TO INTERESTED POSTS A LIMITED NUMBER, SAY 50, OF EACH FAIR'S BROCHURES, BUT WE ARE NOT AWARE WHETHER IT HAS BEEN IMPEMETED (SEE PARA, 3.G, REF G).

ACTIONS TO BE TAKEN:

1. PROMOTE DUTCH BUSINESSMEN'S ATTENDANCE AT ALL FBP EVENTS BY PUBLICATION OF ARTICLES IN EMBASSY COMMERCIAL NEWSLETTER AND MAILING STO APPROPRIATE UNIVERSES.

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2. ORGANIZE GROUP FLIGHTS TO EXTENT POSSIBLE, ESPACIALLY TO FBP EVENTS RELATED TO CCP CAMPAIGNS AND OTHER SPECIAL POST EFFORTS.

3. FOLLOW UP WITH IDENTIFIED DUTCH VISITORS TO FBP EVENTS TO ASCERTAIN RESULTS AND REPORT TO WASHINGTON AS WARRANTED. THE LIST OF DUTCH VISITORS TO INDIVIDUAL FAIRS SENT BY USDOC HAVE HELPED OUR EFFORTS IN THIS REGARD.

K. ACTIVITY NO 11. PRIORITY 18. EMBASSY COMMERCIAL NEWSLETTER.

PRIMARY RESPONSIBILITY: BENOIT O. BROOKENS.

DESCRIPTION/JUSTIFICATION: THE EMBASSY COMMERCIAL NEWSLETTER HAS GAINED BOTH IN CONTENT AND CIRCULATION. WE WILL CONTINUE OUR EFFORTS TO IMPROVE IT AS A TOOL OF US EXPORT PROMOTION BY GEARING IT MORE CLOSELY TO US PROMOTION EVENTS; EXPANDING COVERAGE OF AMERICAN BUSINESS PROPOSALS, INCLUDING ARTICLES ON US INDUSTRY PROGRESS, AND INCREASING ITS CIRCULATION.

ACTIONS TO BE TAKEN:

1. EXPAND COVERAGE IN THE NEWSLETTER OF AMERICAN EXPORT, LICENSING, AND JOINT VENTURE PROPOSALS. PUBLISH TIMELY ARTICLES ON MAJOR EVENTS IN THE US IN EUROPE AND TRADE FAIRS IN THE US WITH SPECIAL EMPHASIS ON THOSE COVERED BY THE FOREIGN BUYER PROGRAM.
3. FEATURE ARTICLES ON THE US ECONOMY, BUSINESS PERFORMANCE, INDUSTRIAL PROGRESS, AND NEW DEVELOPMENTS.
4. PUBLISH ARTICLES ON THE COMMERCIAL SERVICES OFFERED BY THE EMBASSY AND THE CONSUL GENERAL IN AMSTERDAM AND ROTTERDAM.

5. EXPAND THE CIRCULATION OF THE NEWSLETTER TO REACH MORE UNCLASSIFIED

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CURRENT AND POTENTIAL IMPORTERS AND USERS OF AMERICAN PRODUCTS AND SERVICES.

K. ACTIVITY NO 12. PRIORITY 19. MAJOR PROJECTS.
PRIMARY RESPONSIBILITY: BERNARD T.G. KENNEDY.

DESCRIPTION/JUSTIFICATION: WE EXPECT THAT THE NETHERLANDS WILL CONTINUE TO UNDERTAKE MAJOR PROJECTS ALTHOUGH THEY MAY BE LIMITED IN NUMBER. A SPECIAL EFFORT WILL BE MADE, NOT ONLY TO ALERT WASHINGTON REGARDING THESE PROJECTS, BUT ALSO, AS EARLY AS POSSIBLE, TO ASSESS SUCH PROJECTS IN RELATION TO POTENTIAL FOR EXPORT OF US GOODS AND SERVICES.

ACTIONS TO BE TAKEN:

1. MAINTAIN AND EXPAND CONTACTS WITH APPROPRIATE GOVERNMENT OFFICIALS AND COMPANY EXECUTIVES TO LEARN OF PLANNED MAJOR

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FAA-00 DOTE-00 ABF-01 OMB-01 /092 W
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PROJECTS AND FOLLOW DEVELOPMENTS OF KNOWN PROJECTS:PROMPTLY
PASS TO WASHINGTON INFORMATION OBTAINED,EVEN IF INCOMPLETE,
AND RECOMMENDATIONS FOR ACTION, AS NECESSARY.

2. FOLLOW DEVELOPMENTS OF KNOWN MAJOR PROJECTS AND REPORT
RPOMPTLY TO WASHINGTON WITH RECCOMMENDATIINS, AS WARRANTED.

3. CABLE URGENTLY TO WASHINGTON INFORMATION ON SHAPE AND OTHER
TENDERS, AND FORWARD DOCUMENTS BY AIR.

4. INFORM QUICKLY APPROPRIATE AMERICAN COMPANIES OF SUCH
TENDERS, ADVISING WASHINGTON OF NAMES OF FIRMS CONTACTED
TO AVOID DUPLICATION OF EFFORT.

M. ACTIVITY NO. 13. PRIORITY 20. FOREIGN TRADERS INDEX (FTI).
PRIMARY RESPONSIBILITY: BENOIT O. BROOKENS/PETRONELLA VAN GORKOM.
DESCRIPTION/JUSTIFICATION: AS INDICATED BY WASHINGTON IN
REF. A, THE LEVEL OF INPUT TO THE FOREIGN TRADERS INDEX (FTI)
HAS BEEN GENERALLY LOW BECAUSE OF DECREASED REQUESTS FOR WORLD
TRADERS DATA REPORTS (WTDR'S) TO ENHANCE THE VALUE OF FTI
AND OTHER TRADE PROMOTION TOOLS DERIVED FROM IT, WE WILL
START NOW WITH A SYSTEMATIC EFFORT TO UPDATE ENTRIES IN EXIS-
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TING FTI AND GENERATE PROSPECT INFORMATION REPORTS (PIR'S) ON
ADDITIONAL POTENTIAL IMPORTERS OF U.S. PRODUCTS. THIS EFFORT
WILL BE CONTINUED IN FY-78 . TO EXTENT POSSIBLE, WE WILL USE
FRM ATTACHED AS ENCLOSURE TO STATE A-5723, NOVEMBER 29,

1976. UNTIL NEW GUIDELINES AND COPIES OF NEW FORM DBI-467
ARE RECEIVED.

ACTIONS TO BE TAKEN:

1. SYSTEMATICALLY REVIEW AND UPDATE INFORMATION ON DUTCH FIRMS
ALREADY COVERED BY WTDR'S AND FTI, AND FORWARD SIGNIFICANT CHANGES
TO USDOC.

2. PREPARE PIR'S ON EXISTING OR POTENTIAL IMPORTERS OF U.S.
PRODUCTS, NOT YET INCLUDED IN THE FTI, AS DEVELOPED BY PERSONAL
CALLS ON THESE FIRMS OR DURING VISITS BY THEIR EXECUTIVES
TO THE COMMERCIAL SECTIONS OF THE NETHERLANDS' THREE POSTS,
OR AS THEY OTHERWISE BECOME KNOWN TO US.

N. ACTIVITY NO. 14. PRIORITY 21. INVESTMENT PROTECTION AND
FACILITATION.

PRIMARY RESPONSIBILITY: JOHN S. MONIER.

DESCRIPTION /JUSTIFICATION: AMERICAN FIRMS ESTABLISHED IN
THE NETHERLANDS CONTINUED TO RECEIVE PRACTICALLY NATIONAL
TREATMENT. AT THE SAME TIME, THE DUTCH BUSINESS COMMUNITY IS
GENERALLY WELL INFORMED ABOUT INVESTMENT IN THE UNITED STATES.
CURRENTLY, THE INVESTMENT CLIMATE IN THE NETHERLANDS IS NOT
PARTICULARLY ATTRACTIVE, NOT ONLY BECAUSE OF HIGH LABOR COSTS,
BUT ALSO BECAUSE OF HEAVY TAXATION, HIGH PRICES OF LAND,
AND CERTAIN GOVERNMENT POLICIES. ALL THIS CONTRIBUTES TO THE
INHERENT ADVANTAGES OF THE U.S. AS A SITE FOR DUTCH INVESTMENT.
WE WILL CONTINUE OUR ASSISTANCE TO AMERICAN INVESTORS HERE AS
REQUIRED AND ALSO ENCOURAGE POTENTIAL DUTCH INVESTORS TO
DISCUSS THEIR PLANS WITH THE VARIOUS STATE DEVELOPMENT AGENCIES.

ACTIONS TO BE TAKEN:

1. MAINTAIN EXTENSIVE AND CLOSE CONTACT WITH RESIDENT AMERICAN
BUSINESS COMMUNITY AND EXTEND ASSISTANCE AS REQUIRED.

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2. STRENGTHEN CONTACTS WITH DUTCH BANKS, INSTITUTIONAL INVESTORS,
CONSULTANTS, AND COMPANY EXECUTIVES TO INFORM THEM OF THE SERVICES
AND THE INCENTIVES AVAILABLE TO THEM FROM STATE GOVERNMENTS.

3. ARRANGE INTRODUCTIONS FOR POTENTIAL DUTCH INVESTORS WITH
APPROPRIATE STATE AGENCIES AS REQUIRED.

4. ASSIST AMERICAN COMPANIES SEEKING FOREIGN PARTNERS OR
LICENSORS FOR OPERATIONS IN THE U.S.

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Message Attributes

Automatic Decaptioning: X
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Subject: FY-78 COUNTRY COMMERCIAL PROGRAM - NETHERLANDS
TAGS: BEXP, AFSP, NL
To: STATE COM
Type: TE
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